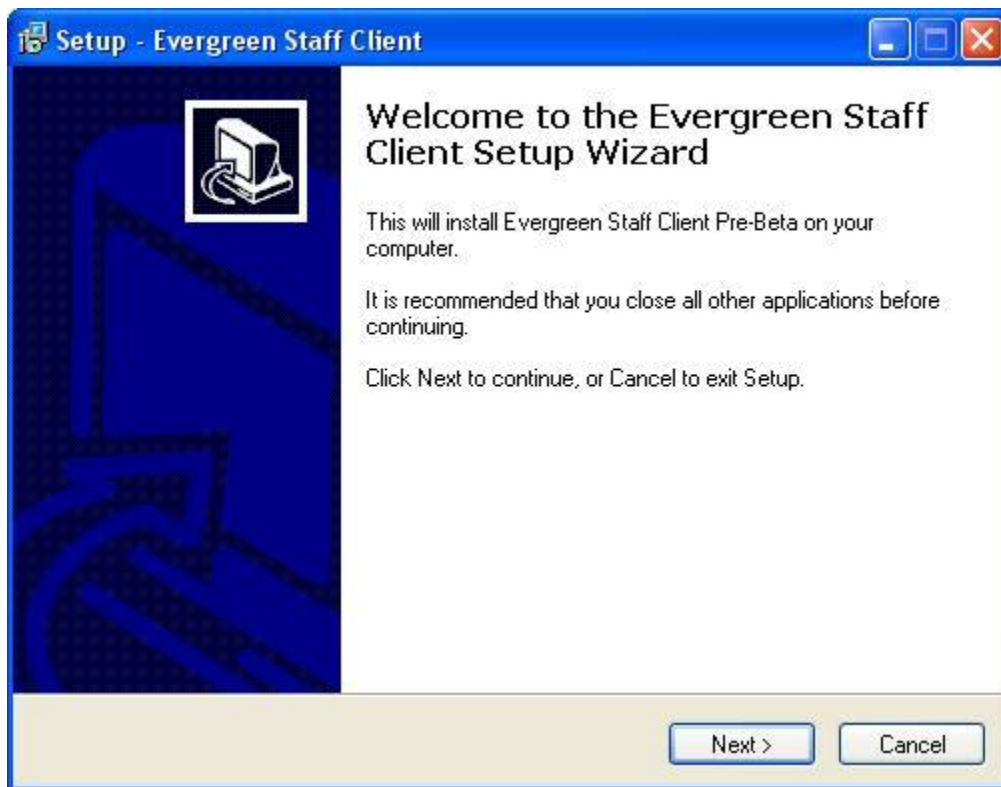




Chapter 1 – Installing the Evergreen ILS

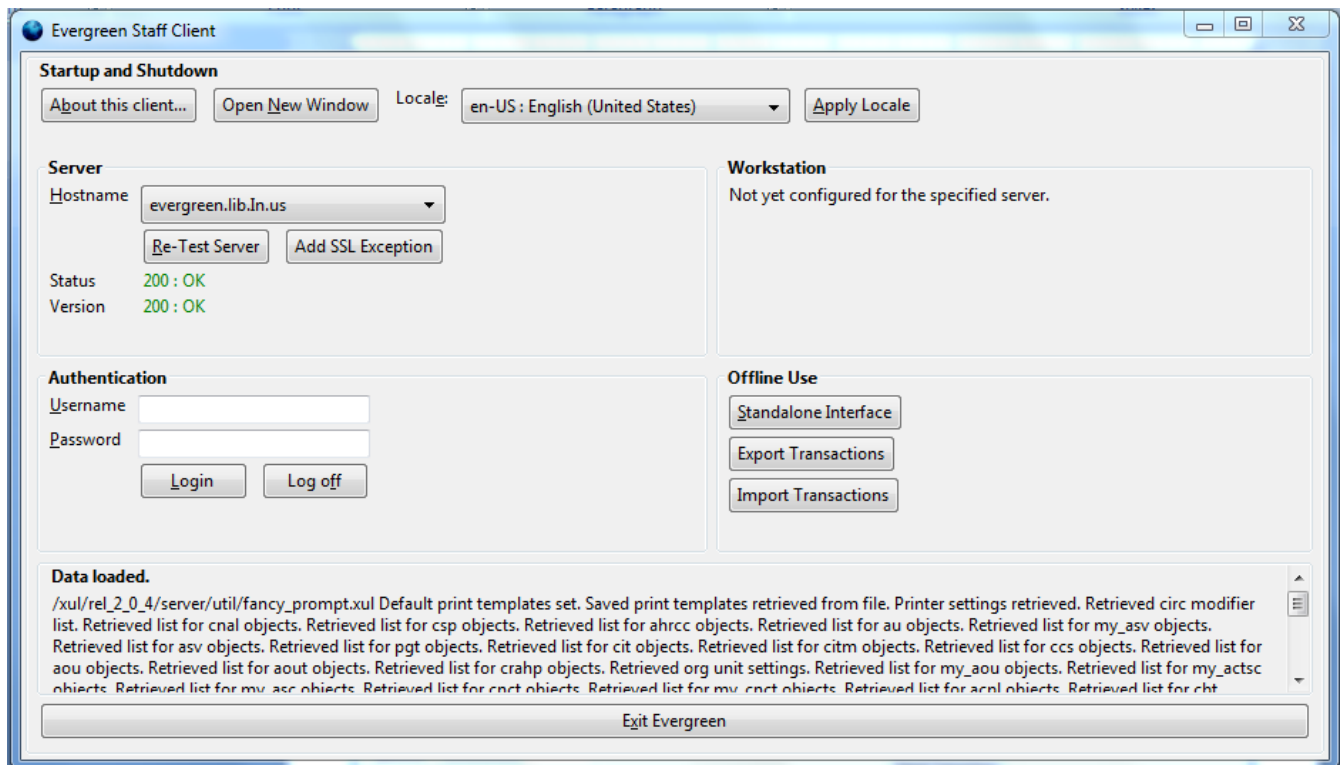
Installing On Windows

The staff client is available for download from the About page of the Weekly Update blog: http://blog.evergreen.lib.in.us/?page_id=89. Download the staff client installer, and run it. A screen will appear that looks similar to this:



Click the Next button to continue through the guided install process. The install wizard will ask you to agree to the end-user license, ask you where to install the software, ask about where to place icons, and then will install the software on your workstation.

When you run the staff client for the first time, a screen similar to this will appear:



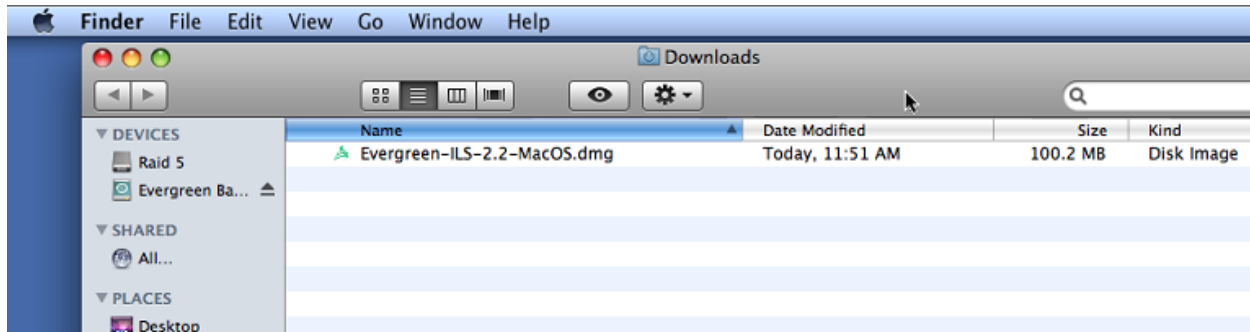
Server: First, configure the server you would like to connect to in the **Server** section. To access the live server, you will use the following hostname: **evergreen.lib.in.us**. After selecting a server, click the **Re-Test Server** button or hit the tab key.

Authentication: The **username** and **password** in the **Authentication** screen will be given to you by the staff at the Indiana State Library. On migration day, you will receive a username and password for circulation, cataloging and local administration activities.

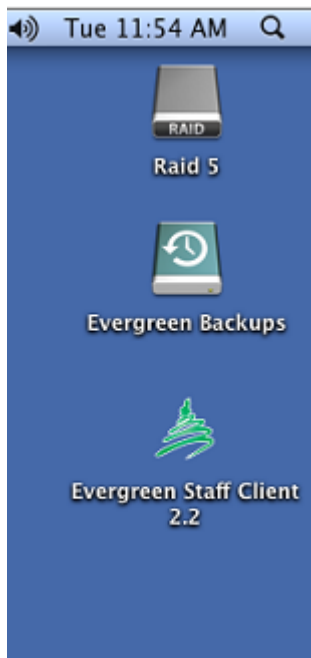
Installing on Mac OS

A staff client for machines running Mac OS is provided in the **Evergreen Indiana Staff Client Repository** (<http://evergreen.lib.in.us/updates/pub/clients/>) and can be installed with a few simple steps.

Simply download the .DMG installer image from the repository and open it from your chosen download location by double clicking.



The image will be mounted to your desktop and an **Evergreen Staff Client** icon will appear. Double click this icon to launch the installer.



The installer interface will appear, similar to the image below. Simply drag the Evergreen Indiana icon to the **Applications** folder to install. Following this, you may “Trash” the Evergreen Staff Client icon from your desktop to “put away” the disk image, which is no longer needed. Please **do not** launch the staff client from within the disk image.

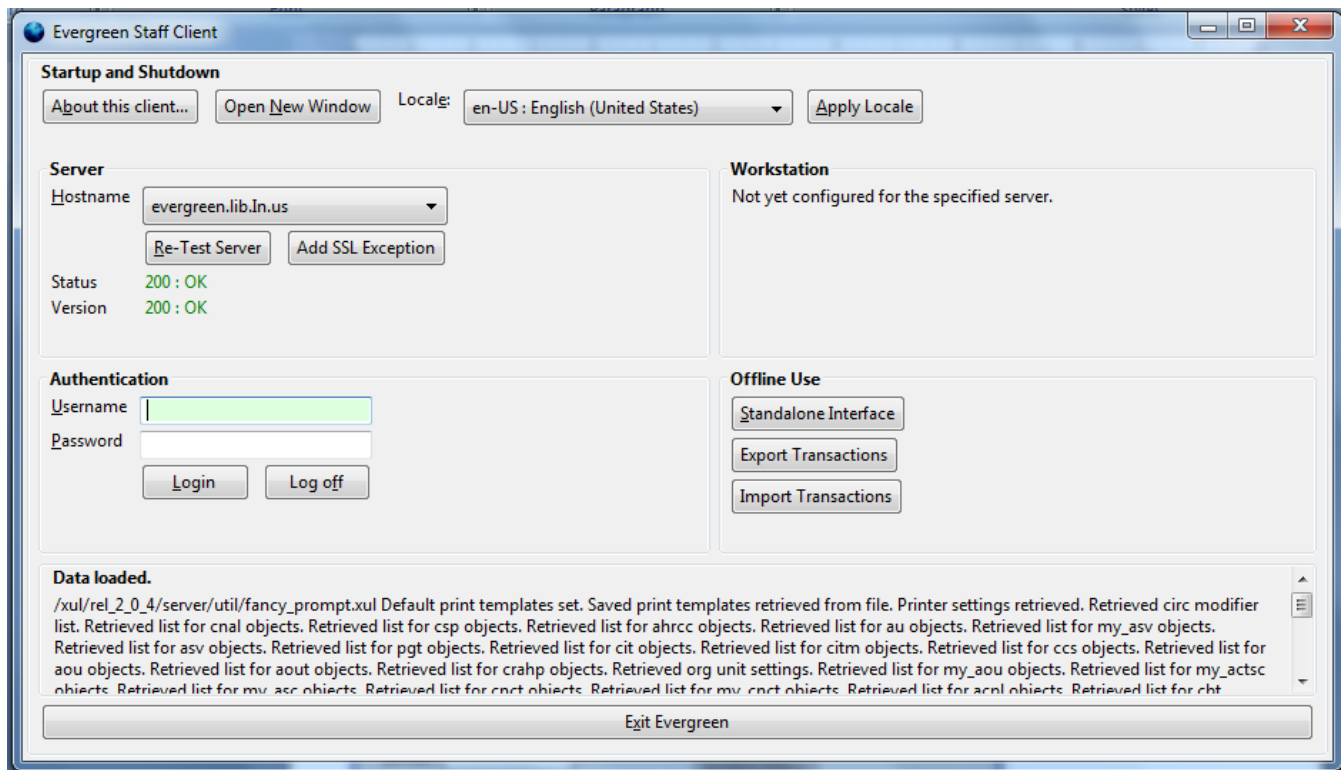
The final shortcut for launching Evergreen will be found in your **Applications** folder, and can also be copied to the desktop or springboard.



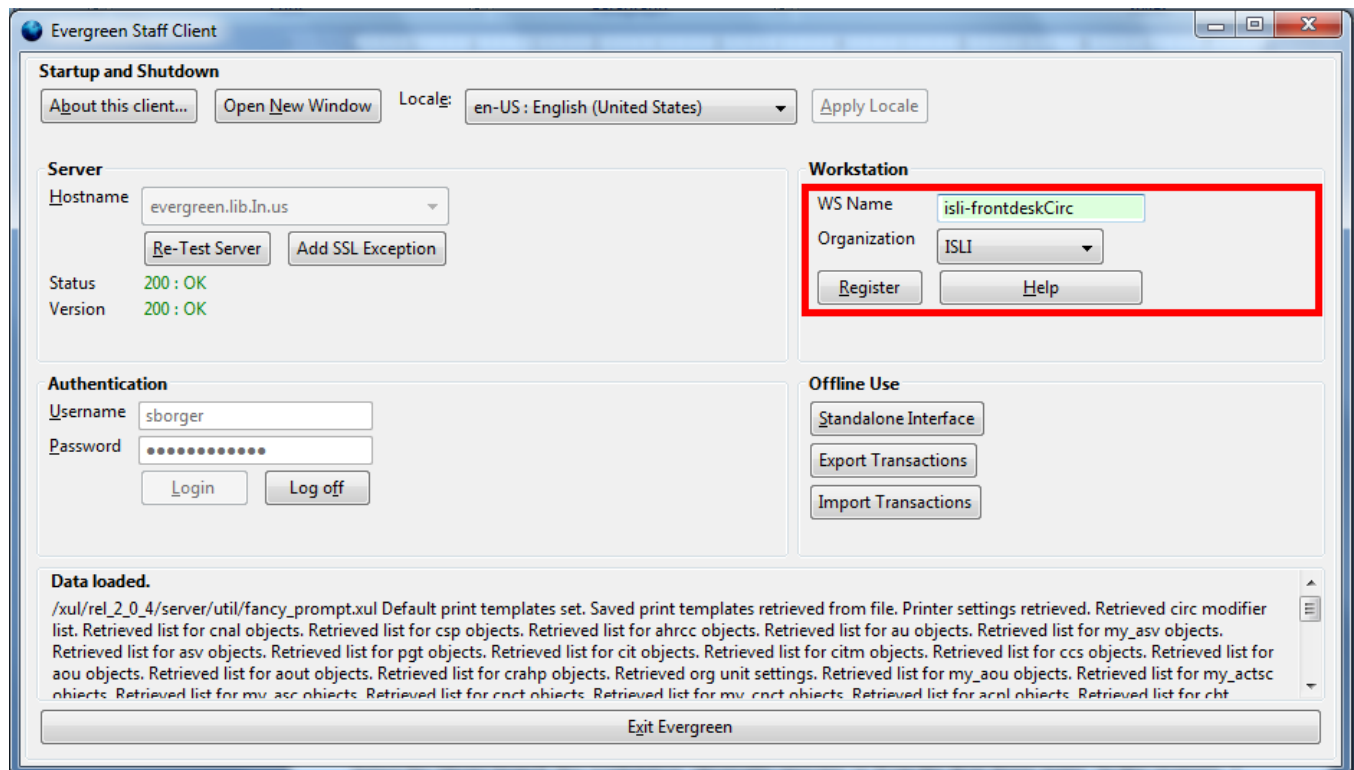


Workstation Names

The Evergreen staff client must be assigned to a library and given a unique name before it will connect fully to the Evergreen server. The only restriction is that the workstation's name must be unique within the assigned library. Make sure to select a workstation name that you will remember later, and reflects the role, purpose, and/or location of a particular computer. These names will come up later in statistical reporting, and can also be handy when troubleshooting.

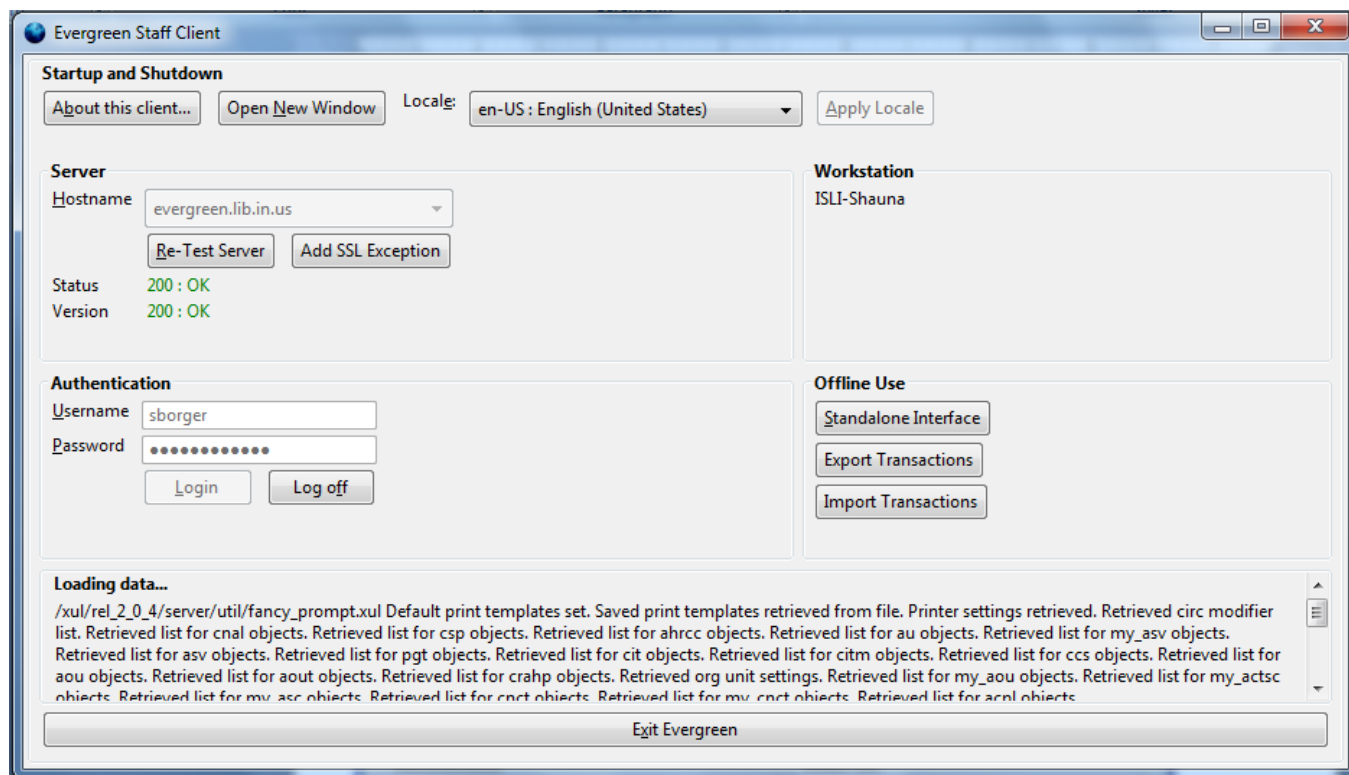


In order to assign a workstation a name, a user with appropriate permissions must login to the staff client (**LocalAdmin**). In Evergreen Indiana, the local system administrator has the ability to assign workstation names in his or her library system. Library managers have the ability within their branch. To assign a workstation a name, login to the system. You will be prompted to assign the workstation a library and a name:



Select the library branch this workstation physically operates in from the drop down menu. In this example, I have selected ISLI. Next, type in a memorable name for the current workstation. Although the name is arbitrary, it is used to identify some transactions which have been conducted on the specific workstation so it is helpful if the workstation name indicates the main activity for which it is used. In the example above, the branch is listed (isli) and then frontdeskCirc is added to indicate that the workstation activity is predominantly circulation. Then hit **Register**.

Once you have registered your workstation with the server, your screen will look like this:



At this point, you are ready to login to the Evergreen staff client for the first time! Re-type in your password, and hit **Login**.

Migration Server

During migration, library data is made available on the Migration Server after the migration mapping is complete. Each library is responsible for testing the data to ensure accuracy before Migration Day. Instructions on testing the data can be found in the Welcome to Evergreen Indiana document, pages 6 and 7.

Download the Evergreen Staff Client (see Chapter 1, A-B).

Server: First, configure the server you would like to connect to in the **Server** section. To access the Migration Server enter **mig.evergreen.lib.in.us**. After selecting a server, click the **Re-Test Server** button. You may need to get a security certificate. You can do this by clicking on the Add SSL Exception button and choosing Get Certificate.

Contact the Evergreen Indiana Coordinator to receive the username and password to gain access to the Migration Server.

Testing Server

Upgrading software is a best practice which takes into account the latest and most effective security settings, increased functionality, and the most current version of the system. Often, the latest version of Evergreen is provided on the Testing Server to allow member libraries to begin documenting new features.

Download the Evergreen Staff Client (see Chapter 1, A-B).

Server: First, configure the server you would like to connect to in the **Server** section. To access the Testing Server enter **dev.evergreen.lib.in.us**. After selecting a server, click the **Re-Test Server** button. You may need to get a security certificate. You can do this by clicking on the Add SSL Exception button and choosing Get Certificate.

Contact the Evergreen Indiana Coordinator to receive the username and password to gain access to the Testing Server.

Training Server

Download the Evergreen Staff Client (see Chapter 1, A-B).

Server: First, configure the server you would like to connect to in the **Server** section. To access the Training Server enter **training.evergreen.lib.in.us**. After selecting a server, click the **Re-Test Server** button. You may need to get a security certificate. You can do this by clicking on the Add SSL Exception button and choosing Get Certificate.

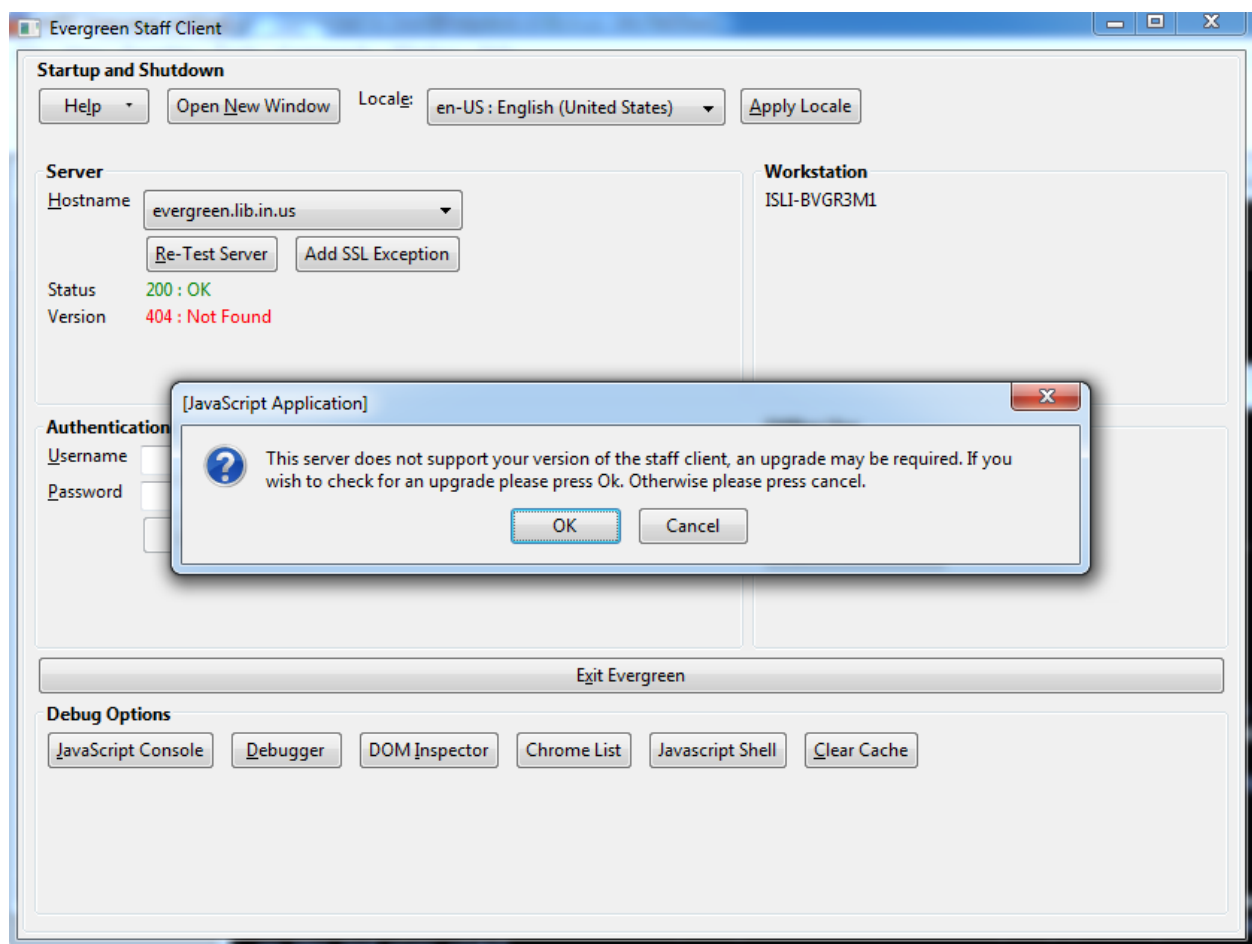
Contact the Evergreen Indiana Coordinator to receive the username and password to gain access to the Training Server.



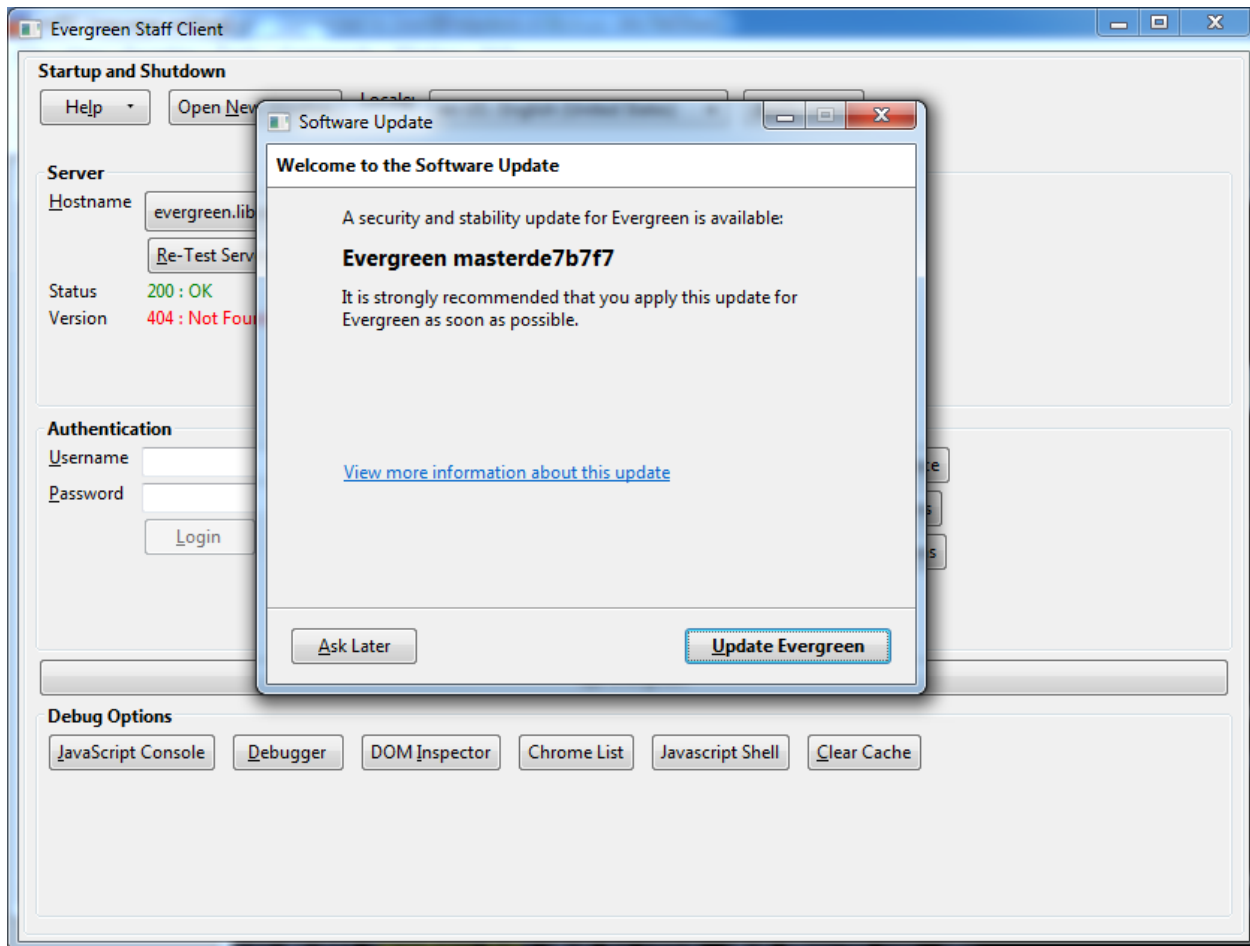
Accessing the Staff Client after an upgrade

Beginning with version 2.1, Evergreen staff clients have an auto-updating feature.

- 1) After an upgrade, the local admin should open the Evergreen staff client the same way as on a normal business day. You will see the screen below. Click OK.



2) The dialog box will be shown below and you should then click on Update Evergreen.



- 3) After the updates are installed, you will receive the dialog box below and be promoted to restart Evergreen. Click on Restart Evergreen and login as you would on a normal business day.

